



USDA Weekly Retail Turkey Feature Activity

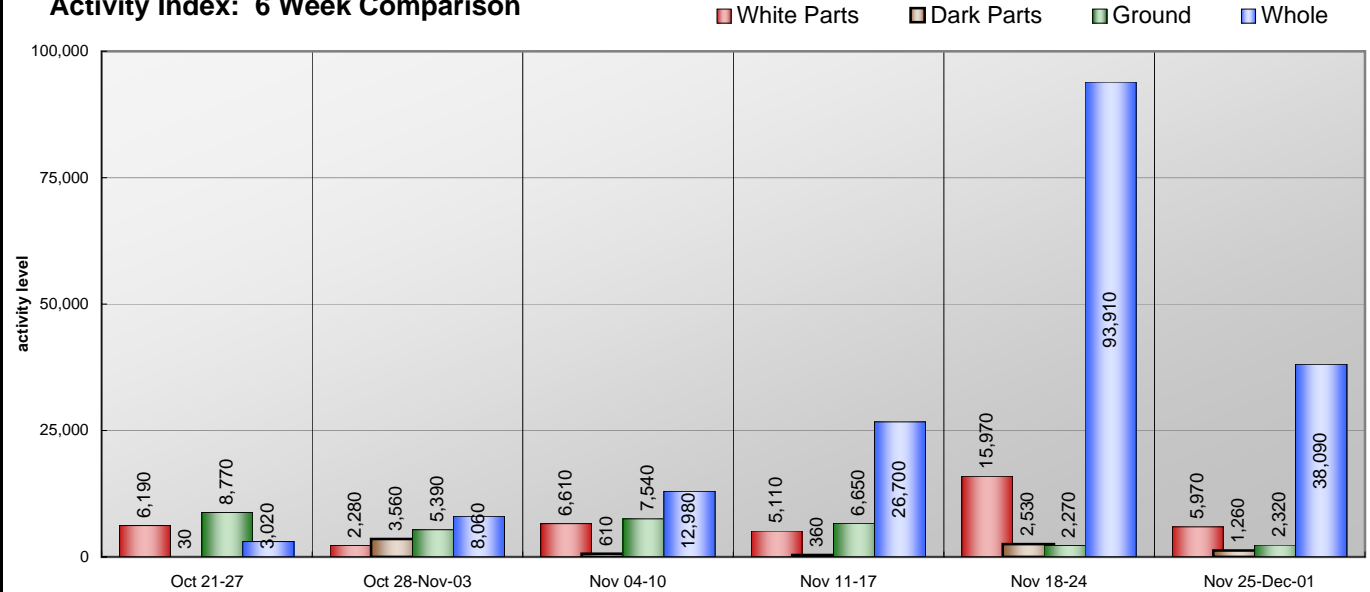
Fri. Nov 25, 2005

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/25 thru 12/01.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

| NATIONAL SUMMARY | | | | |
|-----------------------|-------------------------|---------|--------------------------|---------|
| | THIS WEEK | | LAST WEEK | |
| Feature Rate 1/ | 40.8% of 16,700 outlets | | 100.0% of 16,700 outlets | |
| Special Rate 4/ | 8.3% | | 23.6% | |
| Activity Index 2/ | 47,640 | | 114,680 | |
| 3/ | Stores | Wtd Avg | Stores | Wtd Avg |
| WHOLE BIRDS: | | | | |
| Fresh - Hens | 9,130 | 1.19 | 23,590 | 1.16 |
| " - Toms | 8,490 | 1.17 | 22,970 | 1.15 |
| Frozen - Hens | 10,400 | 0.72 | 23,890 | 0.72 |
| " - Toms | 10,070 | 0.71 | 23,460 | 0.71 |
| PARTS: | | | | |
| Breast: | | | | |
| Bone-in, whole | | | | |
| Fresh | 2,110 | 2.18 | 5,510 | 2.25 |
| Frozen | 3,020 | 1.33 | 8,380 | 1.43 |
| Hotel Style | | | | |
| Fresh | | | | |
| Frozen | | | | |
| Split, bone-in | | | | |
| Fresh | | | | |
| Rotisserie | 720 | 7.75 | 1,780 | 7.96 |
| Boneless, whole | | | | |
| Cutlets | | | 180 | 3.99 |
| Strips | | | 120 | 3.99 |
| Tenders | 120 | 3.99 | | |
| Drumsticks | 140 | 1.02 | 990 | 1.29 |
| Thighs | | | 380 | 1.12 |
| Wings | 120 | 0.99 | 970 | 1.33 |
| Necks | | | | |
| Smoked Drumsticks | 490 | 1.49 | 190 | 1.54 |
| Smoked Wings | 510 | 1.49 | | |
| Smoked Necks | | | | |
| GROUND TURKEY: | | | | |
| Patties | 300 | 2.34 | 160 | 2.42 |
| Sausage | 810 | 2.39 | 730 | 2.29 |
| 85% lean | | | 130 | 1.65 |
| 93% lean | 1,110 | 2.15 | 500 | 2.21 |
| Breast | 100 | 3.99 | 750 | 3.94 |

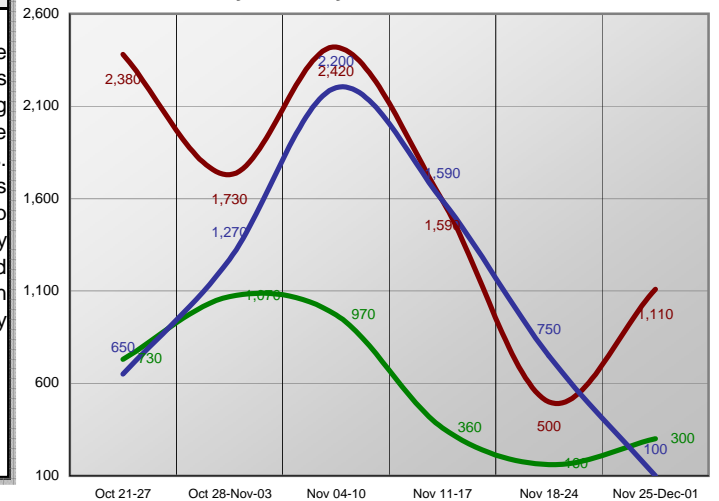
Activity Index: 6 Week Comparison



Turkey Featuring - 11/25 thru 12/01

Turkey feature activity decreased sharply following the Thanksgiving holiday push. Whole bird ads are limited to stores with ad cycles starting on the weekend and to stores extending their normal ad cycles to include the holiday. Whole bird feature prices are about steady with some strength noted for fresh birds. Whole breast ad prices decreased on average by \$0.10 on less than half the activity. Ground turkey, largely ignored in the run up to the holiday, began to reappear late in the ad cycle. Many retailers saw their normal ad cycles disrupted by the holiday and most of these have released limited features, or no features in many instances, into next week with turkey items conspicuously absent.

Ground Turkey Activity



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/: **FEATURE RATE:** the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. 2/: **ACTIVITY INDEX:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300) 3/: **STORES/AVG:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/: **SPECIAL RATE:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.)



USDA Weekly Retail Turkey Feature Activity

Fri. Nov 25, 2005

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/25 thru 12/01.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

| | EASTERN U.S. (CT,DC,DE,FL,GA,MA,MD,ME,NC,NH,NJ, NY,PA,RI,SC,VA,VT,WV) | | | CENTRAL U.S. (AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,MO,MS,ND, NE, OH, OK,SD,TN,TX,WI) | | | WESTERN U.S. (AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY) | | |
|--|--|---------------------------|--|--|---------------------------|--|---|---------------------------|--|
| Feature Rate 1/ Special Rate 2/ Activity Index 3/ | 64.8% of 8,200 sampled outlets 13.7% of stores w/ no-price promotions Activity Index = 40,750 | | | 25.9% of 4,900 sampled outlets 5.2% of stores w/ no-price promotions Activity Index = 5,890 | | | 5.6% of 3,600 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,000 | | |
| | Price Range (\$/pound) | Summary Stores Wtd Avg | | Price Range (\$/pound) | Summary Stores Wtd Avg | | Price Range (\$/pound) | Summary Stores Wtd Avg | |
| WHOLE BIRDS: | | | | | | | | | |
| Fresh - Hens | 0.68 - 1.69 | 7,710 1.18 | | 0.89 - 1.49 | 1,070 1.13 | | 1.49 - 1.69 | 350 1.62 | |
| " - Toms | 0.68 - 1.69 | 7,070 1.16 | | 0.89 - 1.49 | 1,070 1.13 | | 1.49 - 1.69 | 350 1.62 | |
| Frozen - Hens | 0.19 - 1.29 | 8,780 0.74 | | 0.29 - 1.19 | 1,530 0.61 | | 0.49 | 90 0.49 | |
| " - Toms | 0.19 - 1.29 | 8,450 0.73 | | 0.29 - 1.19 | 1,530 0.60 | | 0.29 | 90 0.29 | |
| PARTS: | | | | | | | | | |
| Breast: | | | | | | | | | |
| Bone-in, whole | | | | | | | | | |
| Fresh | 1.89 - 2.49 | 1,960 2.14 | | 1.99 - 2.49 | 30 2.39 | | 2.79 | 120 2.79 | |
| Frozen | 0.99 - 2.69 | 2,600 1.32 | | 0.99 - 1.79 | 420 1.39 | | | | |
| Hotel Style | | | | | | | | | |
| Fresh | | | | | | | | | |
| Frozen | | | | | | | | | |
| Split, bone-in | | | | | | | | | |
| Fresh | | | | | | | | | |
| Rotisserie | 6.49 - 7.99 | 700 7.76 | | 7.49 | 20 7.49 | | | | |
| Boneless, whole | | | | | | | | | |
| Cutlets | | | | | | | | | |
| Strips | | | | | | | | | |
| Tenders | 3.99 | 100 3.99 | | 3.99 | 20 3.99 | | | | |
| Drumsticks | 0.99 | 120 0.99 | | 1.19 | 20 1.19 | | | | |
| Thighs | | | | | | | | | |
| Wings | 0.99 | 120 0.99 | | | | | | | |
| Necks | | | | | | | | | |
| Smoked Drumsticks | 1.49 - 1.59 | 440 1.49 | | 1.49 | 50 1.49 | | | | |
| Smoked Wings | 1.39 - 1.59 | 460 1.49 | | 1.49 | 50 1.49 | | | | |
| Smoked Necks | | | | | | | | | |
| GROUND TURKEY: | | | | | | | | | |
| Patties | 2.24 - 2.50 | 290 2.34 | | 2.50 | 10 2.50 | | | | |
| Sausage | 2.19 - 2.49 | 740 2.38 | | 2.39 - 2.49 | 70 2.47 | | | | |
| 85% lean | | | | | | | | | |
| 93% lean | 1.79 - 2.39 | 1,110 2.15 | | | | | | | |
| Breast | 3.99 | 100 3.99 | | | | | | | |

Note: See page 1 for explanatory notes.

Source: USDA Agricultural Marketing Service, Poultry Market News - (202) 720-6911

website: <http://www.ams.usda.gov/poultry/pymn.htm>